



DVD Tracker™

Trends for DVD Recorder/Writer and Media Markets

Vol. 11 No. 4

Q4 2012

EXECUTIVE SUMMARY– Year-End 2012

DVD recordable technology registered sales of \$2.84 billion in calendar-year 2012. This figure is down from \$3.89 billion of revenue in 2011. DVD recorder sales influenced this decline, with unit sales changing by -23%, to 101 million units. Disc media sales changed by -16%, to 2.7 billion units.

DVD writers were the most important hardware category, with revenue of \$2.25 billion. DVD video recorders, while much smaller in volume, had unit pricing more than eight times that of DVD writers, with revenue of \$75 million.

In the DVD disc media business, revenues totaled \$513 million in 2012. This report reviews five DVD disc formats: DVD-R, DVD-RW, DVD+R, DVD+RW, and DVD-RAM. DVD-R was the most significant recordable DVD format in 2012, with 72% of DVD recordable disc sales, followed by DVD+R, 25%; DVD-RW, 2%; DVD+RW, 1%; and DVD-RAM, less than 1%.

DVD disc media is produced primarily in Asia, with Japan and Taiwan maintaining a large share of this business. **Ritek**, **CMC**, and **Prodisc**, all based in Taiwan, are acting as subcontractors for several international brands; Taiyo Yuden has manufacturing in Japan; and **MCC/Verbatim** continues to manufacture DVD discs, with production in Singapore. **Moser Baer** maintains a significant manufacturing presence for DVD recordable media in its India facilities. There are smaller regional players that have a minor influence on this market.

DVD recordable technology registered sales of \$615 million in Q4, a change of -16% from the previous quarter. DVD writers had sales of \$475 million and 22 million units. DVD video recorders had sales of \$17 million and less than 80,000 units. DVD disc media in Q4 represented revenues of \$123 million. DVD R media (DVD+R and DVD-R) had sales of 623 million units, while the DVD RW segment (DVD+RW, DVD-RW, and DVD-RAM) had sales of 21million units for the quarter.

Entertainment levies in Europe continue to have an impact on country sales of disc media. High-levy countries such as France, Italy, Sweden, Denmark, Austria, Spain, and Hungary have seen their official markets decline because of this trend. Countries with low levies, like Germany, the United Kingdom, Luxembourg, Andorra, Slovakia, Monaco, and San Marino, export to these countries to circumvent the levies.